**Step 1: Understand the goals of your organization/department**

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| ACTION: Identify the vision of your organization/department:   * State the vision and values. * Describe the agency's core responsibilities/programs. | |
| Vision Statement: | |
| Core Responsibilities: | Programs: |

**Step 2: Describe your department’s goals and the structure you will need to achieve them.**

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| ACTIONS:   * List the goals of your workgroup in the column entitled "Department Goal Description." * List your plan to achieve each goal in the column entitled "Plan to Achieve." * Insert or attach a copy of the proposed organization chart that you will use to achieve your goals. * List the roles (Example: Project Manager) you will need in the column entitled "Proposed Workgroup Roles," and identify with a “x” whether you (1) already have them, (2) plan to develop them, (3) hire them, or (4) outsource them in the appropriate columns. |

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| Department Goal Description: | Plan to Achieve: | | | | |
| Proposed Organizational Chart (roles only):  \* please indicate if attached | | | | | |
| Proposed Workgroup Roles: | | Have | Develop | Hire | Outsource |
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**Step 3: Describe the knowledge, skills and abilities (KSAs) needed to achieve your goals**

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| ACTIONS:   * Review your goals and workgroup roles (identified in Step 2), identify KSAs needed to achieve the goals and to successfully function in the role * Identify with a “x” whether the KSA is (1) Core meaning everyone should have, (2) Specialized meaning only a subset need or (3) Cyclical meaning needed for a period of time (i.e. prior to process improvements, recurring operational task/project, etc.) | | | |
| Knowledge, Skills and Abilities | Core | Specialized | Cyclical |
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**Step 4: Evaluate your current talent.**

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| ACTIONS:   * Insert Employee’s name * Insert Employee’s role and/or function * Describe uniqueness of KSA (if applicable) * Indentify with a “x” whether the employee is (1) Fully functioning in their role/function, (2) Developing in their role/function, or (3) Seemingly unsuitable for their role | | | | | |
| Employee | Role/Function | Unique KSA | Fully functioning | Developing | Seemingly unsuitable |
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**Step 5: Determine any gaps**

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| ACTIONS:   * Review your “Proposed Workgroup Roles” (in Step 2), assess them against your current talent (in Step 4) to determine if your original assessment of whether the proposed roles currently exist, are developing, or should be hired (in Step 2) is still accurate. Make any necessary changes in Step 2. * Comparing your proposed workgroup roles and your current talent, identify all roles that are missing or developing, then identify a plan to address this deficiency * Review your list of KSAs needed to achieve your goals (in Step 3), compare them against your current talent (in Step 4) , identify all KSAs missing or developing, then identify a plan to address this deficiency | |
| Roles (missing or developing) | Action Plan: |
| KSAs (missing or developing) | Action Plan: |

**Step 6: Anticipate attrition.**

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| ACTIONS:  *Attrition is a reduction or decrease in number, size, or strength. Attrition can be a result of retirement, involuntary and voluntary termination, transfers, reorganization, etc.*   * Identify the employees that you feel may be considering leaving your organization/department * Indicate the employee’s role * Identify a reason for the departure (retirement, transfer, termination, etc.) * Identify a “best-guess” for attrition date * Indicate the level of vulnerability(high, medium or low) to you achieving your goals if this individual left your organization/department | | | | |
| Employee name | Role | Attrition Reason | Attrition Date | Vulnerability |
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**Step 7: Pull it all Together**

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| ACTIONS:   * Copy your proposed organizational chart (in Step 2) and replace the roles with the appropriate name of the employee that you anticipate will or can function in that role. You may need to provide more than one organizational chart if you factor in your anticipated attrition * Identify on the chart whether the employee is currently fully functional (“F”) or developing (“D”) as indicated in Step 4 * Verify that the roles on the chart that were not replaced with a name are the same roles you indicated as “missing” in Step 5. Resolve any discrepancies. * Compare the list of your current employees with the names on your proposed organizational chart. Identify (below) all employees not listed on the proposed organizational chart.   **Important Note:**  *Subsequent discussions must occur to determine the appropriate action for employees identified below. Being listed below does not automatically indicate a poor performer or incompetence. Some individuals’ skills may be more suited for another organization/department. Please remember workforce planning is a systemic way of identifying and placing the right people, with the right skills, in the right place at the right time.* |
| Proposed Organizational Chart (with names): \* please indicate if attached |
| Employee : |
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**Step 8: Summarize**

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| ACTIONS:   * Answer each of the questions below to provide a cursory overview of the actions to be taken to execute this Workforce Plan | |
| Question: | Response |
| **At the completion of the actions in this Workforce Plan:** |  |
| Will the total number of staff numbers for this unit increase, decrease, or remain the same? |  |
| * By how many? |  |
| How many job descriptions will be changed? |  |
| **Based on the needs expressed in this Workforce Plan:** |  |
| How many employees will need training? |  |
| Please list the types of training that will be needed. \* please indicate if attached |  |
| How many months do you anticipate you will need to complete all the action plans described in step 5? |  |